

Managing Events

Learn how to create and manage events within the Customer Relationship Management Application.

You can do the following with an **Event**:

Invite current Contacts.

Assign Tasks to employees.

Outline those Responsibilities.

Create a Recurring Event.

By creating an event, you are able to:
-Invite current contacts to events.
-Assign tasks for events to sepcific employees
-And create a recurring event.

The screenshot shows a CRM interface with a left sidebar and a main content area. The sidebar contains several menu items: 'Events', 'Tasks', 'Contacts', 'Leads', 'Notes', 'Transactions', 'Reports', and 'Events'. The 'Events' item at the bottom is highlighted. The main content area has a toolbar with a '+ Add New' button and a 'Grid Columns' button. Below the toolbar is a table with columns for 'Subject', 'Status', 'Date', and 'Description'. Two blue arrows point to the '+ Add New' button and the 'Events' menu item, with text instructions: 'Select to add a new Event.' and 'Select 'Events'.'

To begin, select the 'Event' tab, then select the 'Add New' button to create a new Event.

Event - Untitled

Save and Close Recurrence... Cancel

Event Detail

Assigned Tasks

Notes

Subject

Owner Alex Sherman

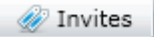
Status Purpose

Start Date Friday, March 05, 2010 10:29:18 AM All Day Event

End Date Friday, March 05, 2010 10:29:18 AM

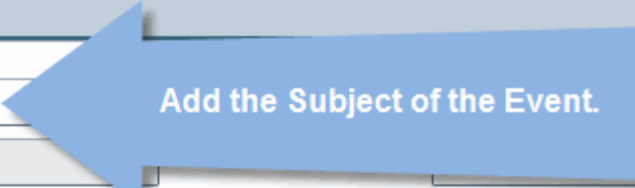
Recurrence

Description

 Invites

Additional eMails

* Separate email addresses with a ';'.



The 'Event' window will then appear. First, add the subject or name of the event in the field shown.

Event - Untitled ⌵

Save and Close Recurrence... Cancel

Event Detail

Assigned Tasks

Notes

Subject

Owner Alex Sherman **Location**

Status **Purpose**

Cancelled

Completed

Planning Stage

Postponed

Scheduled

Client Relations

Community Relations

Entertain Prospect

Public Relations

Description

Invites

Additional eMails

* Separate email addresses with a ','.

Add the Status.

Add the Location.

Select Purpose.

Then add the location of the event, along with the current status of and purpose of the event. If none of the options for 'Status' or 'Purpose' fit your needs, you are able to edit and add these values through the 'Admin' tab under maintenance.

Event - Untitled ☒

Save and Close Recurrence... Cancel

Event Detail

Subject

Owner **Location**

Status **Purpose**

Start Date

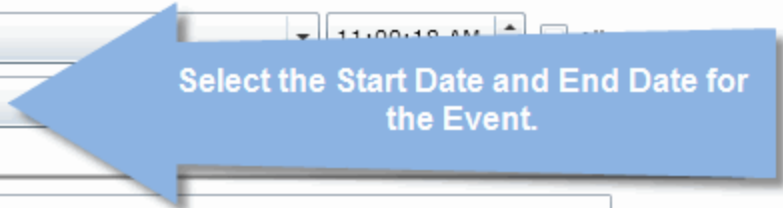
End Date

Recurrence

Description


Additional eMails

* Seperate email addresses with a ';'.



After selecting the status and purpose, you may select the Start and End dates of the event which will appear on your main calendar.

Event - Untitled ☒

Save and Close Recurrence...  Cancel

Event Detail

Subject Launch Event

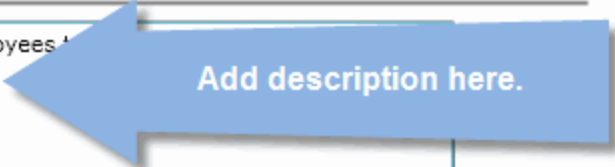
Owner Alex Sherman Location Home Office


Status Scheduled Purpose Public Relations

Start Date Friday, March 05, 2010 12:38:55 PM All Day Event

End Date Friday, March 05, 2010 12:38:55 PM

Recurrence

Description Description of the Event is placed here for employees 

 Invites

Additional eMails

* Separate email addresses with a ','.

Next, if necessary, you may add a description for the event.

Event - Untitled

Save and Close Recurrence... Cancel

Event Detail

Assigned Tasks

Notes

Subject Launch Event

Owner Alex Sherman Location Home Office

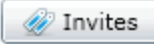
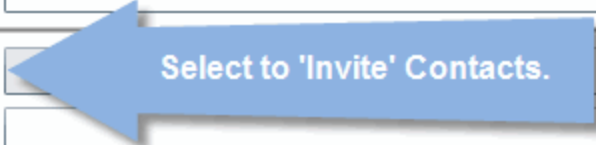
Status Scheduled Purpose Public Relations

Start Date Friday, March 05, 2010 12:38:55 PM All Day Event

End Date Friday, March 05, 2010 12:38:55 PM

Recurrence

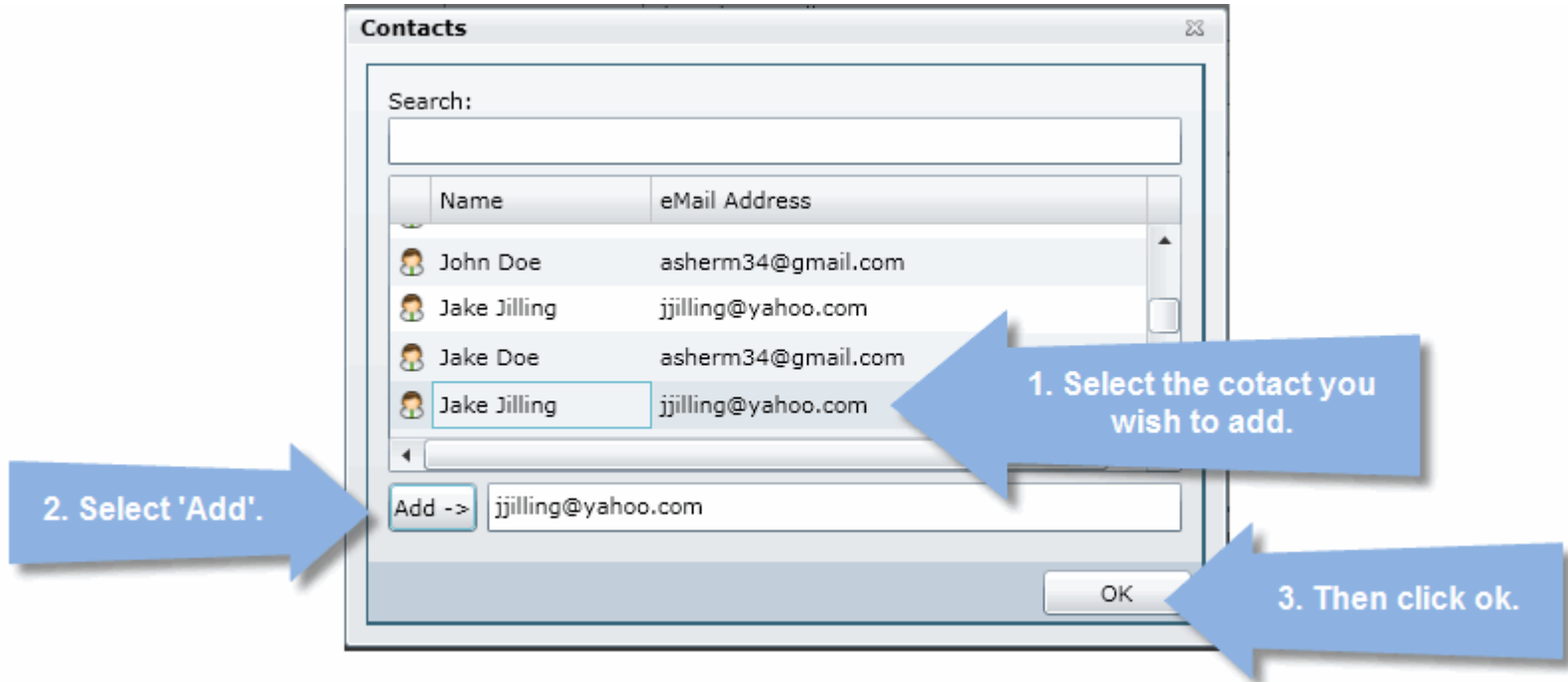
Description Description of the Event is placed here for employees to view. Or to remind the owner.

 Invites 

Additional eMails

* Separate email addresses with a ','.

To invite any contacts to the event, click the 'Invite' button.



To notify your contacts about the specific event you are creating, select the contact, click add, then 'OK' to initiate an eMail that the contact will receive about the event.

Event - New Event

Save and Close Recurrence... **Select to create a 'Recurring' Event.** Delete Record Cancel

Event Detail

Assigned Tasks

Assigned Tasks

Notes

Subject New Event

Owner Alex Sherman Location


Status Scheduled Purpose Client Relations

Start Date Wednesday, February 24, 2010 11:23:34 PM All Day Event

End Date Wednesday, February 24, 2010 11:23:34 PM

Recurrence

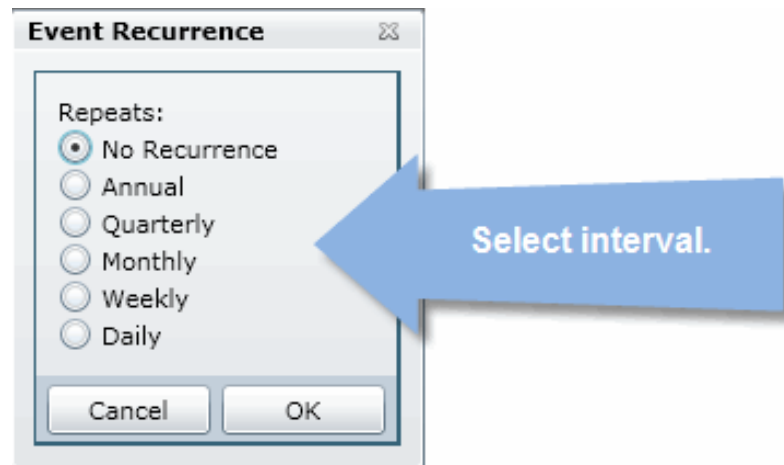
Description

 Invites asherm34@gmail.com

Additional eMails

* Separate email addresses with a ','.

If you would like to make a specific event recurring on a weekly or monthly basis, you are able to do so by selecting the 'Recurrence' button at the top of the window.



After selecting the 'Recurrence' button, you are then able to choose how often an event will reappear. Once you are finished, click the 'OK' button to return to the main screen.

Event - Untitled

Save and Close Cancel

Event Detail

Assigned Tasks

Notes

Subject Launch Event

Owner Alex Sherman Location Home Office


Status Scheduled Purpose Public Relations

Start Date Friday, March 05, 2010 12:38:55 PM All Day Event

End Date Friday, March 05, 2010 12:38:55 PM

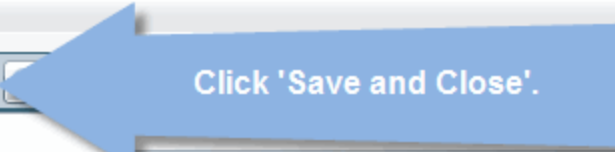
Recurrence

Description Description of the Event is placed here for employees to view. Or to remind the owner.

 Invites asherm34@gmail.com

Additional eMails

* Separate email addresses with a ','.



Once you have completed adding in the information for your event, be sure to click 'Save and Close' to save the 'Event'.

Calendar Today Day Week **Month**

March - 2010





February, 2010

April, 2010

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
February	28	March 1	2	3	4	5 5:38 PM Event: Launch Eve	6
Feb28 - Mar6	7	8	9	10	11	12	13
Mar7 - Mar13	14	15	16	17	18	19	20
Mar14 - Mar20	21	22	23	24	25	26	27
Mar21 - Mar27	28	29	30	31	April 1	2	3
Mar28 - Apr3	4	5	6	7	8	9	10

Your scheduled Event.

Your new 'Event' will then appear in your main calendar.

+ Add New		🔍 Search		⚙️ Action		📄 Multi-Edit Form		📄 Grid Columns		Total Records: 3	
Subject	Status	Purpose	Location	Start Date	End Date	Description					
 New Event	Scheduled	Client Relations		3/27/2010	3/27/2010	Description of the Event is placed here ...					
 Double Click, or select to view details.											
 View Details											
 Spring Launch Event	Scheduled	Public Relations	Atlanta	4/5/2010	4/6/2010	This event should help improve the publi...					

Your new 'Event' will also appear in your 'Event' list. To add or edit any information to an existing event, you may select the 'Event' and click the 'View Details' button to continue.

Event Form: Launch Event

Save and Close Recurrence... Delete Record Cancel

Event Detail

Assigned Tasks

Notes

Subject: Launch Event

Location: Home Office


Status: Scheduled Purpose: Public Relations

Start Date: Friday, March 05, 2010 5:38:55 PM All Day Event

End Date: Friday, March 05, 2010 5:38:55 PM

Recurrence:

Description: Description of the Event is placed here for employees to view. Or to remind the owner.

 Invites

* Separate email addresses with a ','.

You may also add specific notes to a particular event.

You may also assign Tasks to an employee

You are also able to assign tasks to employees and add specific notes to a particular event.